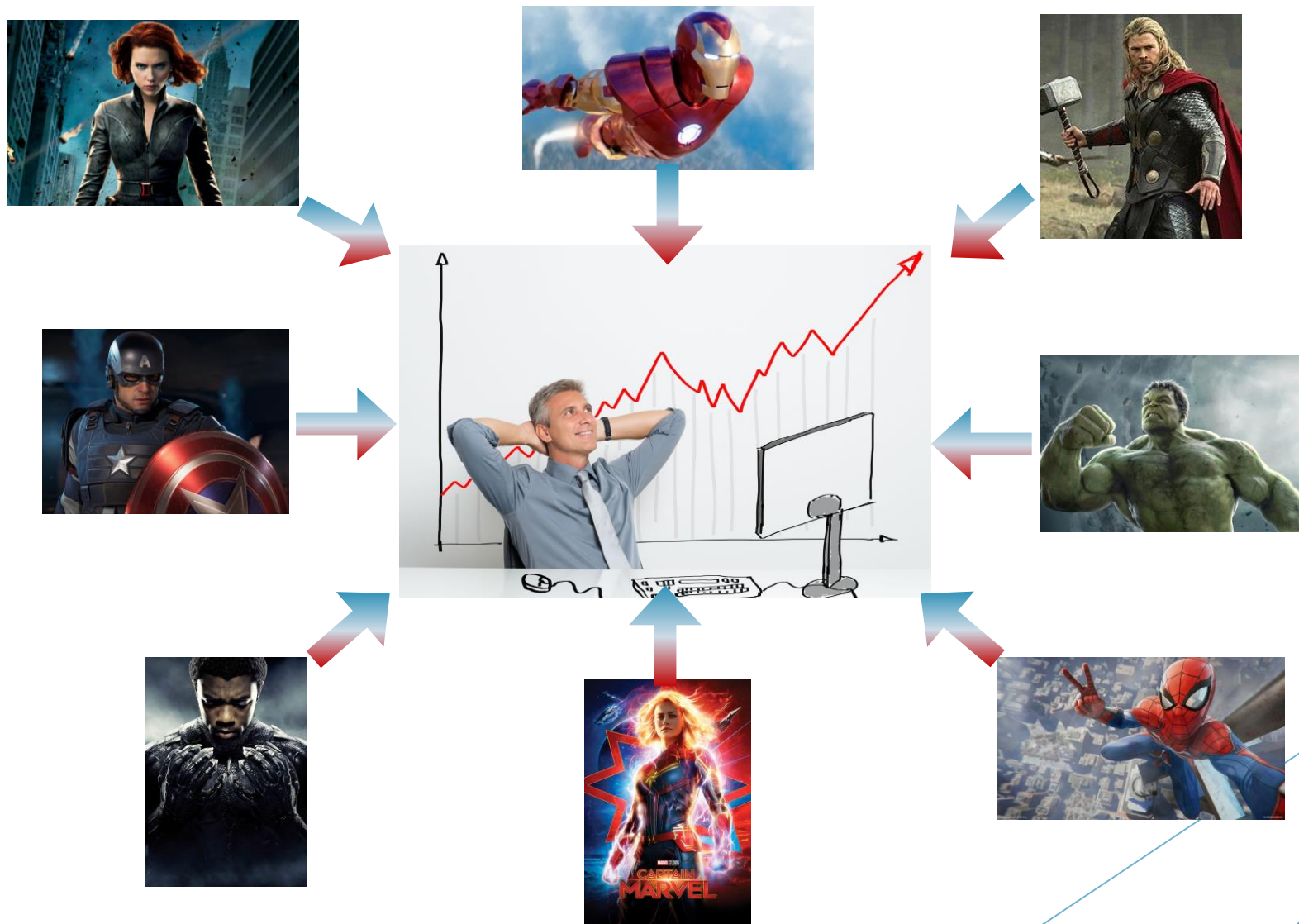


Internal Networking

Getting Smart About Your Company

Mark Chekanow, CFA
Director of Investor Relations
SWM International

IR Draws On All Your Company's Assets



Your Role as an Expert

- ▶ Educate (and promote)



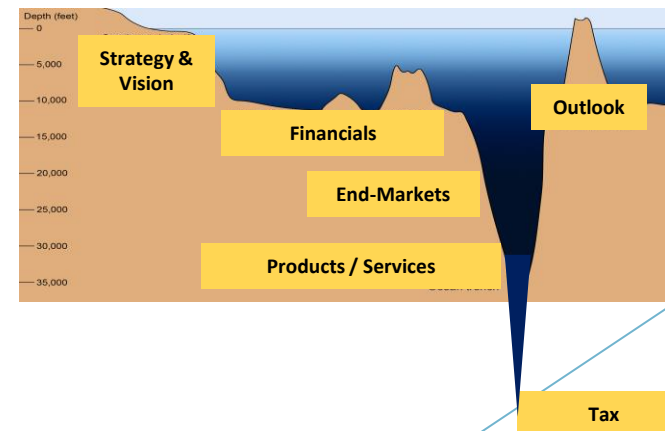
Fine line



- ▶ Be well-versed and always prepared



- ▶ Understand your audience -
high level with ability to go deep



BUT HOW?????

Core Values

1. Establish relationships
2. 2 way street - help out
3. Listen
4. Give context
5. Get in the weeds
6. Be curious
7. Bring the investor perspective
8. Translate and distill
9. Have an inventory of stories/examples
10. Don't be afraid to say "I don't understand"



Strategy & Vision

- ▶ Your “source”: CEO, executive team



- ▶ Goal: Investor should feel like they are talking to the CEO, with an articulate message about the opportunities and direction of the business

Financials

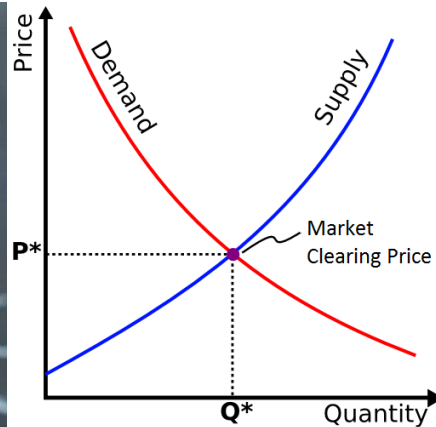
- ▶ Your “source”: CFO, FP&A, controller, SEC reporting, ops/fin leads, all public info



- ▶ Goal: Need to be able to simplify complex information into concise explanations and key takeaways... from technical accounting issues to margin variances to high-level trends

End-Markets

- ▶ Your “source”: commercial leaders and salesforce



- ▶ Goal: You should be able to explain the key drivers of your markets, customers, and competition...with detailed anecdotes and examples to bring it to life

Products / Services

- ▶ Your “source”: commercial leads, plant managers, engineers, developers



- ▶ Goal: Be able to explain your products, how they work, your competitive advantages... make your investors feel like they truly understand what you provide

Outlook

- Bring ALL YOUR SOURCES together



- Goal: Get an investor excited about where your business is headed and how you will get there

Some Things I Do (Beyond “The Usual”)

- ▶ Produce Monthly BoD package, 1:1 monthly calls with business leaders
- ▶ Visit sites when possible... meet operators, salesforce, etc.
- ▶ Make myself a go-to for my CFO for ad-hoc requests or projects, always a chance to learn
- ▶ Get involved in M&A diligence, integration
- ▶ Help co-workers with management/BoD presentation
- ▶ Educate co-workers on investor perspective on all their “output”... context!



Andy: “I understand you’re a man who knows how to get things.”

Red: “I’ve been known to locate certain things from time to time.”

Q&A (hopefully there's already been a lot)

